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Platinum

for Windows by Best

Version 5.1

SUMMARY OF CHANGES

- ◆ Increased Field Sizes
- ◆ Document Number Masking
- ◆ Elimination of GL Lookup Chart
- ◆ New Country Table
- ◆ New VB Reports
- ◆ Custom Reports by Company
- ◆ Files in Pervasive.SQL 7 Format
- ◆ Floating Point Numeric to IEEE Format
- ◆ New Form Layouts

Act on your Insights

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Table of Contents

1.	<i>Introduction</i>	1
2.	<i>Release Details</i>	1
2.1.	Increased Field Sizes	1
2.2.	Document Number Masking	1
2.3.	Elimination of GL Lookup Chart	2
2.4.	New Country Table	3
2.5.	New VB Reports	3
2.6.	Custom Reports by Company	3
2.7.	Files In Pervasive.SQL 7 Format	3
2.8.	Floating Point Numeric to IEEE Format	4
2.9.	New Form Layouts	4
2.10.	Data Conversion	4
3.	<i>Problem Reports Fixed</i>	4
4.	<i>User Guides and Help</i>	4
5.	<i>Product Distribution</i>	5
6.	<i>System Requirements</i>	5
6.1.	Installation	5
6.2.	System Configuration	5
6.2.1.	Network File Server	5
6.2.2.	PFW Client Workstations and Process Applications Servers	5
7.	<i>Products/Support Discontinued</i>	5
7.1.	U.S. English Version	5
7.2.	Double Byte Support	6
8.	<i>Controlled Release Notes</i>	6
9.	<i>Contact Information</i>	6

1. INTRODUCTION

This document is intended to inform Platinum for Windows by Best (PFW) users of the new features and functionality included in the Platinum for Windows 5.1 release.

The 5.1 release reflects Best's commitment to developing the features and functions that are needed by our customers and solution partners, and to continually improve the Platinum for Windows product.

Platinum for Windows 5.1 introduces several new features and improvements to this award-winning suite of financial, distribution, and process manufacturing applications. The most notable and extensive is the increase in field sizes that has been long anticipated.

We are pleased to deliver this new version of Platinum for Windows, and are looking forward to working with you on your upgrades and rollouts.

2. RELEASE DETAILS

2.1. Increased Field Sizes

One of the primary and most noticeable of the differences in this release is the increase in size of many key fields within the Platinum for Windows database. Specifically, those fields include:

- Document Numbers – 16 Characters (maximum of 9 number auto increment within 16 character mask)
- Customer Key – 12 Characters
- Ship-to Key – 8 Characters
- Vendor Key – 12 Characters
- Item Key – 30 Characters
- GL Account Number – 32 Characters (GL Lookup Key eliminated)
- Description in Journal Batch Entry – 60 Characters
- Terms/FOB/Ship Via Keys – 4 Characters

2.2. Document Number Masking

Each type of document number has a corresponding user defined mask. This mask defines the static portion of the document number plus the number of digits desired (up to nine) for the system-generated portion of the document number (e.g., 2002-#####-12). The total size can be no larger than 16 characters.

There can be a static portion in the mask both before and/or after the numeric portion. The auto-increment portion must be contiguous. The total mask (static and auto-increment portions) can be up to a maximum of 16 characters.

In order to make Invoices more easily separable from Credit Memos, a new document number sequence, Next Credit Memo Number, has been added to the Accounts Receivable module with a corresponding mask definition. Printing of Invoices and Credit Memos is also now separated, and you must specify in the parameter screen for the Print and Post for these documents which type of document you are processing.

Document Type	Mask	Next Number
Invoice Number Mask	#####	
Next Invoice Number		1043
Credit Memo Number Mask	CM #####	
Next Credit Memo Number		8000
Transaction Number Mask	#####	
Next Transaction Number		6
Deposit Number Mask	#####	
Next Deposit Number		500
Order Number Mask	#####	
Next Order Number		60035
Late Charge Number Mask	#####	
Next Late Charge Number		100
Finance Charge Number Mask	#####	
Next Finance Charge Number		900

However, in order to accommodate those who wish to continue to use a single auto-number sequence for both Invoices and Credit memos, we have included a check box in the above screen that will allow you use a single sequence for both.

Due to larger field sizes for document numbers, the option of creating hexadecimal numbers in Accounts Receivable has been removed.

The following is a brief outline of Document Number Masking:

- Mask can be up to 16 characters
- System generated portion of mask (auto number) can be up to 9 digits (we recommend a minimum of five)
- Static portion of mask can be before and/or after system generated number (e.g., 2002-#####-12)
- Examples of valid masks:
 2002-#####-12
 #####
 #####
- Examples of invalid masks:
 #####-##### (auto-number not contiguous)
 ### ## # (auto-number not contiguous)
 2002-#####(auto-number too large)
- Entire “masked” number will be saved as a transaction’s document number.
- Auto Data Conversion for PFW 5.1 will create default masks with nine digits and no static portion (i.e., #####).

This last point is very important. After converting existing data, you will want to make any changes to the mask for each document type before processing new transactions. Although you can change this mask at any time, doing so will cause what may appear to be sorting errors on reports. As these are alphanumeric fields, sorting will be working correctly; it will just appear to be incorrect. You can expect this to happen after data conversion, as we will not be converting historical document numbers. For example, you may have a new document mask of “#####” with a new document number of “0123456” and an old document of “12345”. Despite your instinct, “0123456” will sort before “12345” because, as an alphanumeric field, it will sort from left to right, and “0” is less than “1”. While this may be temporarily annoying, it will work itself out as older documents move to history.

Masked fields in PFW 5.1 are:

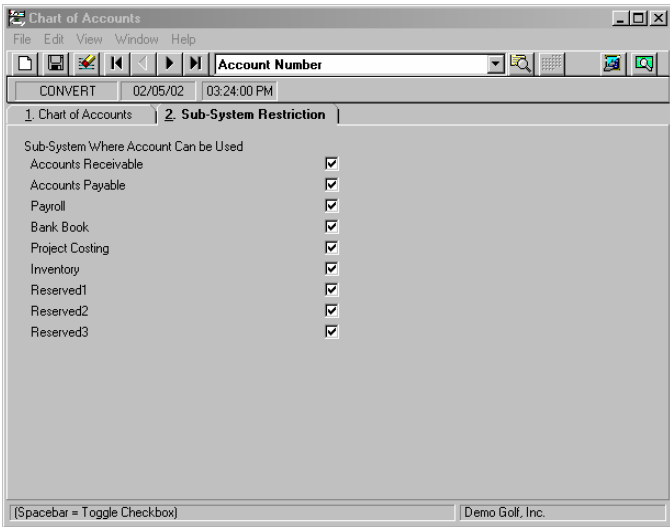
- Accounts Payable
 - Voucher Number
 - Check Number
- Accounts Receivable
 - Invoice Number *
 - Credit Memo Number *
 - Transaction Number
 - Deposit Number
 - Late Charge Number
 - Finance Charge Number

* These can optionally be combined into a single mask/sequence (see above).
- Bank Book
 - Document Number
- Purchase Order
 - Purchase Order Number
- Sales Order
 - Sales Order Number

2.3. Elimination of GL Lookup Chart

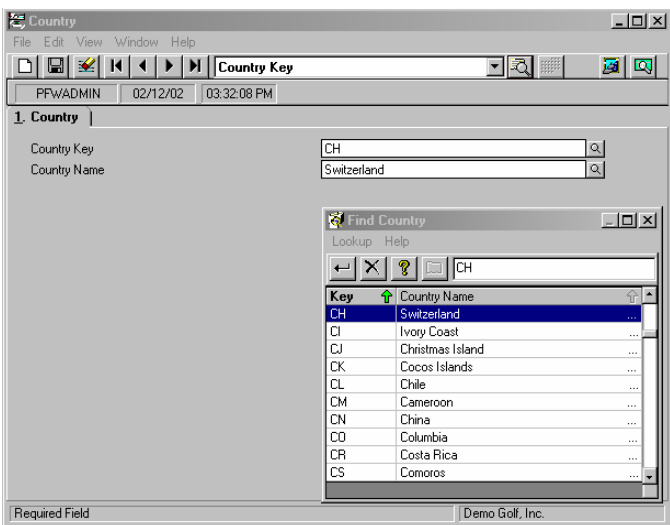
The expansion of all GL Account numbers to 32 characters has eliminated the need for the “Lookup Chart” functionality. Therefore, the Generate Lookup Chart function and associated tables have been removed from the product.

We have, however, retained the functionality of restricting use of accounts in sub-systems. The Chart of Accounts and main Account Segments maintenance screens now have a new tab that allows you to designate which sub-systems that an account can be used in. Technically, this is implemented via a series of additional indices on the NLCHART table.



2.4. New Country Table

As part of improving the internationalization of Platinum for Windows, we have added a new table and associated maintenance screen for the Country table. Maintenance of this table can be found under the System Manager tab. This allows users to add/change/delete country codes as needed. Note that we do not check to see if a code that is being deleted is used, nor will we update this table automatically when upgrading PFW versions in the future.



2.5. New VB Reports

Due to requests from the field, the following reports have been removed from the Listing

Generator and made into Visual Basic/Crystal reports:

- Journal Batch Detail Listing
- Inventory Transaction History Listing

This change means that the reports are now more easily customizable and are easier to read.

2.6. Custom Reports by Company

In Platinum for Windows 5.0, we introduced a method for storing and preserving custom Crystal Reports that were a direct replacement for our “as shipped” versions. In Platinum for Windows 5.1 we have extended that capability by allowing custom reports to be saved by company, thus allowing for differences in common areas such as Invoice formats. The new rules are:

- “As shipped” reports are in:
`\PLATINUM\PFWRES\MASTER`
- Custom reports to be accessed by all companies should be stored in:
`\PLATINUM\PFWRES\MASTER\CUSTOM`
- Custom reports specific to a company should be stored in:
`\PLATINUM\<(company subdirectory)\CUSTOM`

In selecting a report to be executed, we will first look in the company specific custom subdirectory, then in the global custom subdirectory, and finally in the “as shipped” subdirectory. Note that the subdirectory names for the global customization and “as shipped” directories will change in translated (non-U.S. English) versions and conform to the translation subdirectory naming standards.

2.7. Files In Pervasive.SQL 7 Format

In order to keep current with changes in the Pervasive.SQL database, we will be converting all files in the company database to Pervasive.SQL 7 file format. This means that each and every table in your company database will go through the data conversion process, so plan accordingly.

2.8. Floating Point Numeric to IEEE Format

Historically, Platinum for Windows has used the “bFloat” format to store floating-point numbers. This format was first introduced by Microsoft as part of their implementation of the Basic programming language. Support for that data type has declined over the years, so in order to be more easily compatible with third-party tools, we have converted all “bFloat” floating point numbers to the industry standard IEEE format.

2.9. New Form Layouts

The increased field lengths discussed above has made it necessary to change the layouts of the pre-printed forms. In order to take advantage of the larger field sizes, you will need to either obtain new forms, or customize the report files (.RPT) that produce the forms. This is the first major forms change in PFD/PFW in over a decade, so make sure you plan properly for this.

For those that will not be using the new larger field sizes, we have created base .RPT files that can be used to customize the layouts for old forms. They can be found in the \OLDFORMS sub-directory on the distribution CD.

Please be sure and save your customized report files to the appropriate \CUSTOM subdirectory.

2.10. Data Conversion

During the data conversion, virtually every table in each company subdirectory will be changed. Therefore, we highly recommend that you set up PFW in a subdirectory structure that is different than the one used for the existing version of PFW, install PFW 5.1 into the new area, then copy over companies from the old area. More details can be found in the Upgrade Guide.

Due to the changes in field lengths, the conversion will modify the following fields as indicated:

- The following fields will be right justified and zero filled if their content is all numeric (the numbers 0-9 with no other characters embedded, including dashes, dots, slashes or

spaces). This will be on a record-by-record basis. Therefore, a Terms Key of “N” will now be “N ” (“N” followed by three spaces), whereas a terms key of “2” will now be “0002”.

- Customer Key
- Ship-to Key
- FOB Key
- Ship Via Key
- Terms Key
- Vendor Key
- Item Key
- The following fields will remain as-is, and be padded to the right with blanks to the new field length.
 - All Document Numbers

These numbers were preserved as we believe it to be critical to maintain historical documents electronically with the same document numbers as their printed counterparts.

Finally, all fields that were previously stored as an 8-character GL Lookup field will be converted to their corresponding 32-character GL Accounts.

3. PROBLEM REPORTS FIXED

As is normal with each release, we have been able to close a number of outstanding Problem Tracking Report (PTR) items. Please see the Upgrade Guide for a list of the more important issues closed in this release.

4. USER GUIDES AND HELP

Virtually every guide contains changes due to the table differences in PFW 5.1. Please also note that there have been a number of smaller improvements in the product that are not documented in this release guide. Refer to the user guides and help as necessary.

5. PRODUCT DISTRIBUTION

As this is a point release, it will be distributed to users automatically. In order to qualify for the automatic shipment, users must be on PFW version 5.x, and be current on maintenance as of the release date.

VARs, Authorized Consultants, Solutions Providers and Master Developers will automatically be shipped the GA release.

6. SYSTEM REQUIREMENTS

6.1. Installation

When upgrading client workstations from a previous version of Platinum for Windows, it is critical that you uninstall any previous version of the PFW client and Crystal Reports (if version is less than 8.5). Simply installing the new version over the old will not work. To see if a particular DLL could be an issue, bring up either the \System or \System32 subdirectory, as appropriate to your operating system, in Windows Explorer. Find the .DLL and .EXE files that begin with "CR". Right click on them and choose "Properties" from the drop-down menu. Go to the "Version" tab. Choose "Company Name" and "Product Version" from the window on the left in order to see those values in the window on the right. Our Crystal Clear utility on the distribution CD can help in eliminating many of these problems.

6.2. System Configuration

The minimum system configurations are as follows:

6.2.1. Network File Server

Network Operating Systems

Microsoft Windows NT Server 4.0 (SP 6a or later), Windows 2000 Server, or Novell NetWare 6.x

Hardware

- 500 MHz Pentium processor

- 1 GB or greater free hard disk space
- Monitor: VGA
- 256 MB RAM minimum
- 32-bit NIC

6.2.2. PFW Client Workstations and Process Applications Servers

Operating Systems

Microsoft Windows NT 4.0 Workstation, Windows 2000 Professional, Windows XP Professional, or Windows ME. Microsoft Windows 2000 Professional and Windows XP Professional are preferred.

Internet Browser

- If using Microsoft Internet Explorer, version 6.0 or later must be installed

Hardware

- 500 MHz Pentium processor
- Monitor: VGA
- 128 MB RAM Minimum
- 300 MB free hard disk space on the drive where the \PFW directory is created
- 100 MB free hard disk space on the C: drive
- CD-ROM drive (one per network)
- 32-bit NIC

7. PRODUCTS/SUPPORT DISCONTINUED

7.1. U.S. English Version

Due to continued use in the installed base, critical software patches and support for Version 4.8a of Platinum for Windows will be continued for at least one year past the release of PFW 5.1. We will provide 12 months notification of discontinuation of support for that version. Thus supported versions are now PFW 4.8a, 5.01 and 5.1.

7.2. Double Byte Support

Although PFW 5.1's architecture and development environments are inherently double-byte capable, full testing in this environment has not been completed. We strongly encourage our partners wishing to use PFW 5.1 in a double-byte environment to thoroughly test their unique implementations in advance.

For information on FRx in specific double-byte environments, please contact FRx directly.

8. CONTROLLED RELEASE NOTES

In addition to changes made elsewhere in this guide, the following are high-level notes that we uncovered during the Controlled Release cycle which should help you achieve more successful installations.

- When upgrading a workstation from Windows 9x to Windows 2000 or XP, we have encountered problems, even with Microsoft applications if the new version of Windows was installed over the old version. It should be a clean install.
- When running the conversion, **do not** split a company so you can convert using multiple workstations. The elimination of the GL Account Lookup Key and Lookup Charts creates interdependence between modules during conversion, thus data from all modules must be present in the same location.
- After the conversion, do not delete the NLCHART.P51 file from the company subdirectories. This is an image of the NLCHART file, including the now discontinued GL Account Lookup Key, at the time of conversion. While we do not use it for continuing PFW operations, and it is not updated by subsequent changes in the live NLCHART, it may be needed by third-party programs in order for them to eliminate the GL Lookup Key from their systems.

9. CONTACT INFORMATION

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